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European Union experiences with GIs: market size and key GI names

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Focusing on foods

- Wine and spirit issues largely resolved
 - Bi-lateral wine agreements
 - But we can learn from studies of wine GIs
- Foods are contentious in trade negotiations
 - Can they attract the same premiums as wines?
 - How far do they travel?
 - Potential market size

AND-International (2012), Value of production of agricultural products and foodstuffs, wines, aromatised wines and spirits protected by a geographical indication, Commissioned by the European Commission (tender no. AGRI-2011-EVAL-04), http://ec.europa.eu/agriculture/external-studies/2012/value-gi/final-report_en.pdf

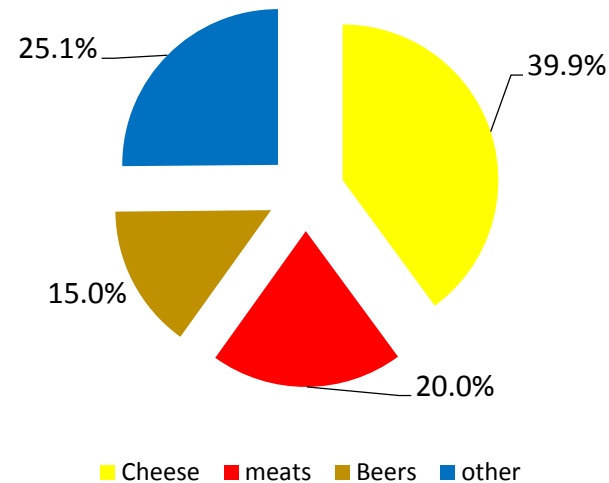
Foods: sales value, 2010

GI labelled food (and beer) production: €15.8 b
total production (food and beers) €277.0 b

GI label share of food and beer **5.7%**

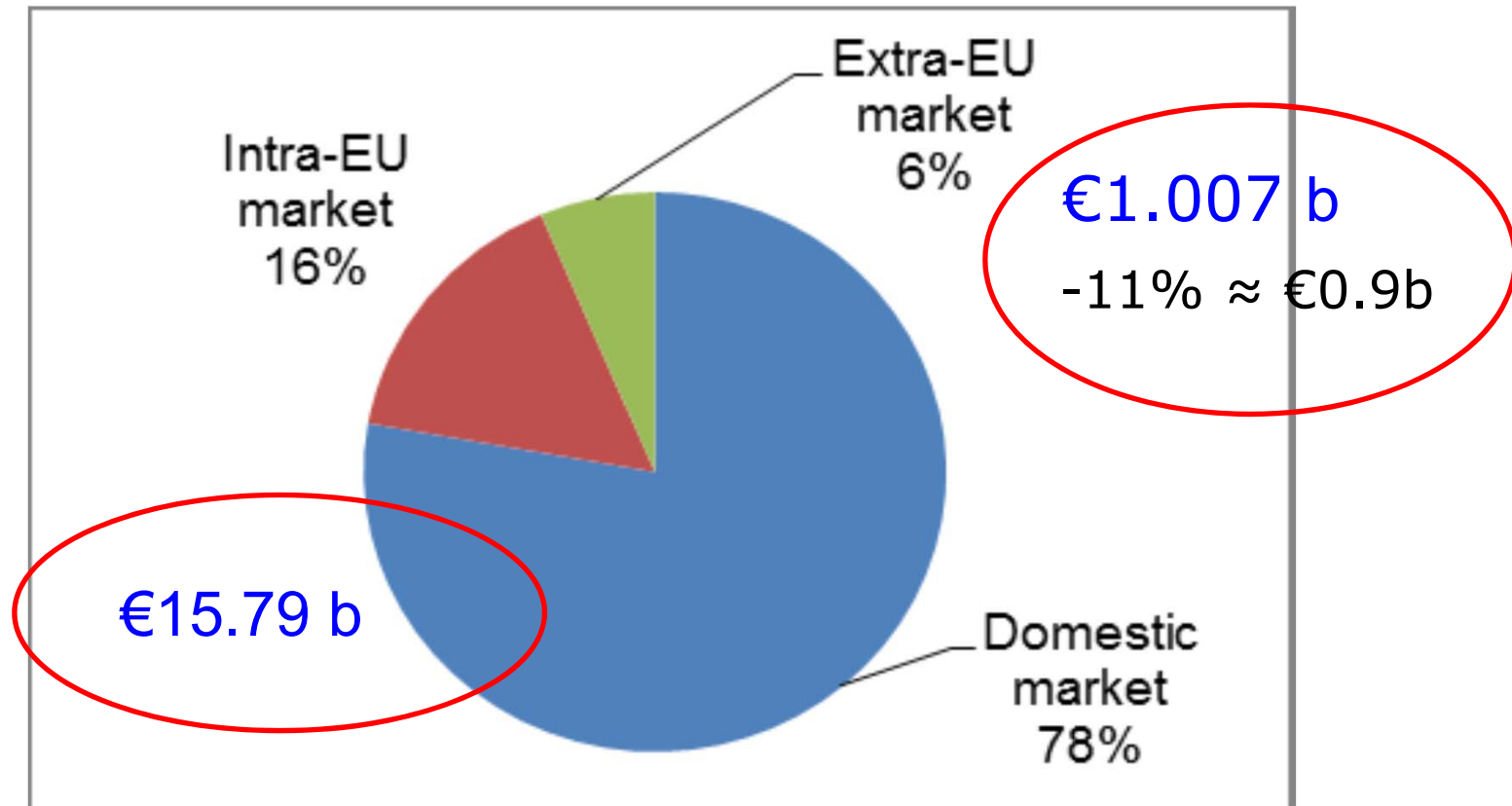
**cheeses,
processed meats
beer**

dominate – 75% of sales value



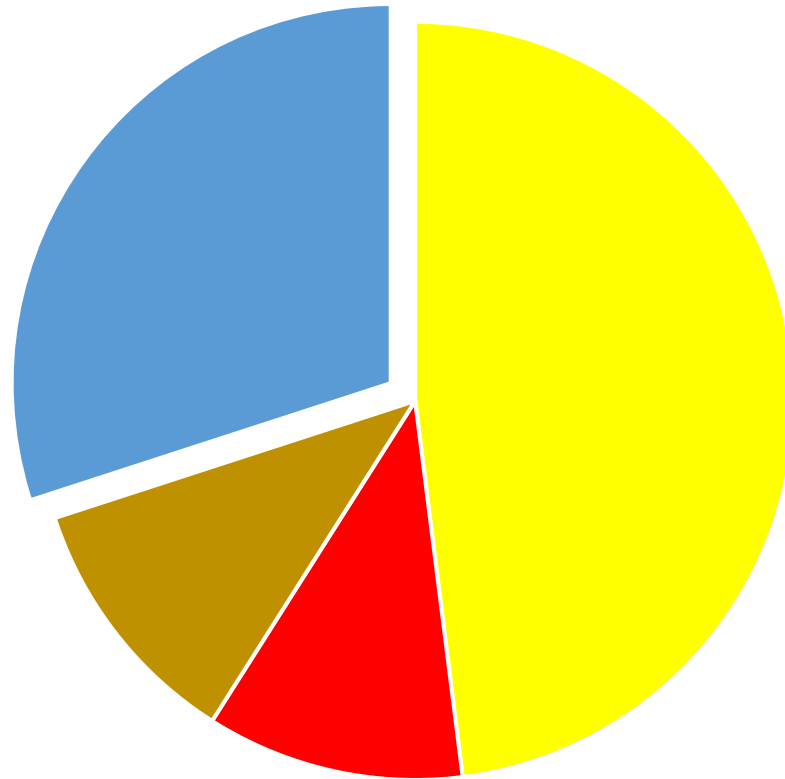
Source: AND-International (2012),
http://ec.europa.eu/agriculture/external-studies/2012/value-gi/final-report_en.pdf

GI foods: by destination, 2010



Source: AND-International (2012), Figure 26 [11% of exports to Switzerland]

GI food exports beyond Europe 2010



Cheeses:
€483 m

Meat products:
€111 m

Beers:
€111 m

Other:
€302 m

EU and the global cheese market

- Global cheese market:
 - US\$25.4b (2016)
 - EU has 81% share (approx US\$ 20.5b – 2016)
 - EU GI-labelled value - €483m (2010) [≈US\$580m]
 - about 2.3% of global cheese sales
 - about 2.8% of EU cheese exports

Concentration of GI value (all GI products)

- Italy: 38% of the €15.8b value
 - cheeses and meat products
- Germany: 21% of value, mainly beer
- France: 19% of value, mainly cheeses

- Overall 58% from Italian cheese, German beer, Italian meats and French cheeses

Shares of GIs, GDP, population and agricultural value added

	Share of EU total (percent)				Over-under representation of GIs vis-à-vis indicator		
	GIs by 2012	Population, 2012	GDP (PPP) 2012	Agricultural value added, 2000-07	pop	GDP	Ag VA
Germany	6.8%	16.0%	20.0%	10.6%	0.4	0.3	0.6
France	18.1%	13.1%	14.0%	18.3%	1.4	1.3	1.0
UK	4.6%	12.7%	13.4%	7.6%	0.4	0.3	0.6
Italy	22.3%	11.9%	11.9%	14.9%	1.9	1.9	1.5
Spain	14.9%	9.3%	8.6%	13.3%	1.6	1.7	1.1
Poland	2.2%	7.7%	5.0%	4.7%	0.3	0.4	0.5
Greece	8.5%	2.2%	1.6%	3.9%	3.9	5.3	2.2
Portugal	11.0%	2.1%	1.5%	2.0%	5.2	7.1	5.6
Czech Rep	2.4%	2.1%	1.7%	1.3%	1.2	1.4	1.9

Sources: GI data from DOORS, GDP and population figures from <http://knoema.com>; agricultural value added figures (for 2000-07 in €millions) from London Economics, 2008: 52.

The key GI names: treaty outcomes

GI name	Degree of "protection" provided to European registered GI			
	Singapore	Korea	Canada	Vietnam
Asagio	✓	✓	✗	✗
Comté	✓	✓	-----	✓
Feta	✓	✓	✗	✗
Fontina	✓	✓	✗	✗
Gorgonzola	✓	✓	✗	✗
Grana Padano	✓	✓	✓	✓
(Queso) Manchego	✓	✓	-----	✓
Mozzarella di Buffala Campana	✓	✓	✓	✓
Parmigiano Reggiano	✓	✓	✓	✓
Pecorino Romano	✓	✓	✓	✓
Queijo São Jorge	✓	✓	-----	✓
Reblochon	✓	✓	-----	✓
Roquefort	✓	✓	-----	✓
Mortadella Bologna	✓	✓	✓	✓
Prosciutto di Parma	✓	✓	✓	✓
Prosciutto di San Daniele	✓	✓	✓	✓
Prosciutto Toscano	✓	✓	✓	✓
Azafrán de la Mancha	✓	✓	-----	✓
Jijona y Turrón de Alicante	✓	✓	-----	✓

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